

A FINANCIAL MANAGEMENT SYSTEM

REPLACED BY
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Technical Field

This invention relates to financial management
5 systems and particularly those embodied in computer
hardware or software.

Background to the Invention

Many people do not have a clear understanding of the
10 fundamental principles and concepts which underlie the
management of finances and find interpreting numerical
accounts reports to be very difficult. To assist with
this, some financial management systems provide accounts
reports that are expressed with the aid of graphics such
15 as graphs or charts. However, the user is required to
operate the system by working exclusively with numerical
data in order to produce such a graphical report. Thus, a
level of competence and understanding of numerical
accounts information is still required to operate systems
20 of these types.

Summary of the Invention

In a first aspect the present invention provides a
financial management system including presentation means
25 for presenting financial information to a user wherein at
least some of the financial information is represented by
at least one graphic; manipulation means for manipulating
the at least one graphic in response to an action of a
user; and modifying means which modifies the financial
30 information based on the manipulation of the at least one
graphic.

By use of this system, financial information can be
worked upon whilst it is represented in a graphical format

may represent the financial information wholly numerically. In this way, the system can output financial information in a wholly numerical format for use by persons who have an understanding of wholly numerical financial reports. Thus, by use of the system a user can receive numerical financial information such as from their accountant, manipulate the information by use of graphics, and then represent the modified information numerically for sending back to their accountant.

10 The system may further include means for generating icons representative of budget items within an overall budget.

The system may further include means for associating a graphic with each icon whereby that budget item can be modified by manipulating the graphic.

The system may further include means for generating icons representing a time period over which a budget is to extend.

In a second aspect the present invention provides a method of managing financial information including the steps of presenting financial information to a user wherein at least some of the financial information is represented by at least one graphic; manipulating of the at least one graphic by the user; and modifying the financial information based on the manipulation of the at least one graphic.

The step of manipulating the at least one graphic may further include the step of resizing the graphic.

The step of manipulating the at least one graphic may further include the step of moving the graphic.

The method may further include the step of creating a graphic and the financial information represented by that graphic.

THE CLAIMS DEFINING THE INVENTION ARE AS FOLLOWS:

1. A financial management system including:
presentation means for presenting financial
5 information to a user wherein at least some of the
financial information is represented by at least one
graphic;
manipulation means for manipulating the at least one
graphic in response to an action of a user; and
10 modifying means for modifying the financial
information based on the manipulation of the at least
one graphic.
2. A financial management system according to claim 1
wherein the financial information that the at least
15 one graphic represents is proportional to a dimension
of the graphic and the graphic may be manipulated by
being resized.
3. A financial management system according to either
claim 1 or claim 2 wherein the financial information
20 that the at least one graphic represents corresponds
to the position of the graphic and the graphic may be
manipulated by being moved.
4. A financial management system according to any one of
the preceding claim further including creation means
25 for creating a graphic and the financial information
represented by that graphic.
5. A financial management system according to any
preceding claim further including means for
generating icons indicative of positive and negative
30 financial status.
6. A financial management system according to any
preceding claim further including means for storing
the financial information.

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7. A financial management system according to any preceding claim further including means for substituting the at least one graphic with an alternative graphic.
- 5 8. A financial management system according to any preceding claim wherein the means for presenting the financial information can represent the financial information wholly numerically.
9. A financial management system according to any
10 preceding claim further including means for generating icons representative of budget items within an overall budget.
10. A financial management system according to claim 9 further including means for associating a graphic
15 with each icon whereby that budget item can be modified by manipulating the graphic.
11. A financial management system according to either claim 9 or claim 10 further including means for
20 generating icons representing a time period over which a budget is to extend.
12. A method of managing financial information including the steps of:
presenting financial information to a user wherein at least some of the financial information is
25 represented by at least one graphic;
manipulating of the at least one graphic by the user;
and
modifying the financial information based on the manipulation of the graphic.
- 30 13. A method according to claim 12 wherein the financial information that the at least one graphic represents is proportional to a dimension of the graphic and the step of manipulating the graphic includes the step of

resizing the graphic.

14. A method according to either claim 12 or claim 13
wherein the financial information that the at least
one graphic represents corresponds to the position of
the graphic and the step of manipulating the graphic
includes the step of moving the graphic.
15. A method according to any one of claims 12 to 14
further including the step of creating a graphic and
the financial information represented by that
graphic.
16. A method according to any one of claims 12 to 15
further including the step of generating icons
indicative of positive and negative financial status.
17. A method according to any one of claims 12 to 16
further including the step of storing the financial
information.
18. A method according to any one of claims 12 to 17
further including the step of substituting the at
least one graphic with an alternative graphic.
19. A method according to any one of claims 12 to 18
further including the step of representing the
financial information wholly numerically.
20. A method according to any one of claims 12 to 19
further including the step of generating icons
representative of budget items within an overall
budget.
21. A method according to claim 20 further including the
step of associating a graphic with each icon whereby
that budget item can be modified by manipulating the
graphic.
22. A method according to either claim 20 or claim 21
further including the step of generating icons
representing a time period over which a budget is to

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extend.

23. A computer program arranged to instruct a computing system to implement a system according to any one of claims 1 to 11.
- 5 24. A computer readable medium carrying a computer program according to claim 23.

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10 By their Patent Attorneys
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